

# 2000



Telefile and Web filing  
begin January 15, 2001



CALL OR CLICK. GET IT QUICK!

- It's fast!
- It's accurate!
- It's safe!

See inside for details.



# Massachusetts Telefile Booklet

Full-Year Residents Only

[www.massdor.com](http://www.massdor.com)



Department of Revenue Commonwealth of Massachusetts



# What Is E-File?

E-File is filing your state personal income tax return electronically through one of four methods offered by the Massachusetts Department of Revenue (DOR):

## Telefile



Telefile allows eligible taxpayers to E-File by touch-tone telephone. Millions of taxpayers have used Telefile, completing their calls in an average of eight minutes. **It's free and available 24 hours a day, 7 days a week.** See the next page to determine if you are eligible to Telefile.

## NEW! The Web



E-Filing via DOR's website, [www.massdor.com](http://www.massdor.com), is easy and secure. Simply fill out the online tax form, which performs most of the calculations for you, submit it, and receive confirmation that you have filed. **It's free and available 24 hours a day, 7 days a week.** This new E-File method replaces DOR's "PC File" method.

## Paid Preparer



Hundreds of thousands of taxpayers have had their returns E-Filed through a DOR-approved preparer. If your preparer does not offer E-File, ask him or her to give it a try! Visit [www.massdor.com](http://www.massdor.com) for a list of approved preparers.

## Commercial Tax Preparation Software



You can also E-File using DOR-approved commercial tax filing websites or software products. Visit [www.massdor.com](http://www.massdor.com) for a complete listing of approved websites and products.

This E-File method is also known as "Online Filing."

## Why Should You E-File?

- **Less stress.** If you E-File you will not have to worry about math errors, missing schedules or other common mistakes which could delay your refund or cause other problems that take time to resolve. And E-File is safe. Returns are transmitted via secure telephone connections or encrypted Web connections. PLUS, you will receive immediate confirmation that serves as proof you filed. **E-File and relax.**
- **Fast refunds.** Whether you E-File in January or mid-April, you will receive your refund, on average, in three to four days and sometimes as fast as 48 hours. You also have the option of having your refund deposited directly into your bank account. (Some commercial tax preparation products may not offer direct deposit.) **Call or click, get it quick!**
- **Easy to use.** Whether you call or click to file your return, or have your preparer E-File for you, it is as easy as pressing a button. If you prepare your own return, E-File walks you through it step by step, and does most of the calculations for you. **Try it! What do you have to lose?**
- **Convenient payment options.** If you owe money, you can file now and mail your check later, up to April 17, 2001. With Telefile you can also pay using MasterCard, Visa, Discover or Novus brand card.

## Would You Like More Information?



Visit DOR's website, [www.massdor.com](http://www.massdor.com) or call (617) 887-MDOR, or toll-free in Massachusetts, 1-800-392-6089.



CALL OR CLICK. GET IT QUICK!



CALL OR CLICK. GET IT QUICK!

## You Can Telefile



- ▶ If you were a Massachusetts resident for all of 2000;
- ▶ If your filing status is either single, married filing a joint return, or head of household;
- ▶ If you have a total of five or fewer Forms W-2 or 1099-MISC;
- ▶ If you received income reported on Forms 1099-DIV, 1099-G, 1099-INT, or 1099-R;
- ▶ Even if you own your home;
- ▶ Even if you made estimated tax payments in 2000;
- ▶ Even if you received unemployment compensation and/or Massachusetts bank interest;
- ▶ Even if you have pension, annuity, winnings and/or fee income;
- ▶ Even if you have a dependent member of your household under age 12 as of 12/31/00;
- ▶ Even if you are claiming the rental deduction;
- ▶ Even if you are claiming the student loan interest deduction;
- ▶ Even if you have non-Massachusetts bank interest and/or dividend income; or
- ▶ Even if you moved or your filing status has changed (only from single to head of household or from head of household to single).

## You Cannot Telefile



- ▶ If you were not a Massachusetts resident for all of 2000;
- ▶ If your filing status has changed as a result of marriage, separation or divorce;
- ▶ If you have adjustments to your non-Massachusetts bank interest and/or dividend income other than Massachusetts bank interest and/or you are required to complete Schedule B, Part 2;
- ▶ If you are claiming deductions other than amounts paid to Social Security, Medicare, U.S., R.R. or Massachusetts retirement; or
- ▶ If you are filing Massachusetts Schedule(s) C, D, E or Z.

For information about recent tax law changes that may affect your tax return, call (617) 887-MDOR or toll-free in Massachusetts 1-800-392-6089.

## Why You Should Telefile

- ▶ It's easy. Only ten minutes to complete your Telefile worksheet and an eight-minute phone call;
  - ▶ It's fast. Get your refund in four days, with the option of direct deposit into either your savings or checking account;
  - ▶ It's convenient. Telefile is available 24 hours a day, 7 days a week;
  - ▶ You can update your address if you have moved;
  - ▶ Telefile does all the calculations for you, including No Tax Status, Limited Income Credit and the Earned Income Credit. **Note:** You must have your federal Earned Income Credit amount from your U.S. return or as computed by the IRS if you wish to claim the Earned Income Credit on Telefile;
  - ▶ You can confirm and correct all of your entries as you file;
  - ▶ There's nothing to mail in;
  - ▶ You will receive a confirmation number and receipt as proof of your filing;
  - ▶ If you have a tax due, you can file now and pay later using the Telefile payment voucher (by April 17) or pay now in full with your MasterCard, Visa, Discover or Novus brand card; and
  - ▶ Online information is available simply by pressing the star (\*) button on your telephone keypad.
- Join the millions of taxpayers who have already used Telefile to file their returns and receive their refunds quickly.



## Before You Call



Verify your name and address on the back of the booklet.

Find your four-digit Personal Identification Number (PIN) next to your name and address on the back of the booklet. If you received a preaddressed Form 1 booklet in the mail, you may use the PIN located on the back cover.

**Note:** Your PIN should be retained. You may need it to use DOR's Web-based and/or Interactive Voice Response (IVR) applications, such as checking the status of your refund.

If you did not receive this booklet in the mail, you will need your requested refund or tax due amount from your 1999 Massachusetts tax return to begin Telefile. If you received a refund, the amount can be found on your 1999 Form 1, line 40, Form 1-NR/PY, line 45 or Telefile Worksheet, line 14. If you owed tax, the amount can be found on your 1999 Form 1, line 41, Form 1-NR/PY, line 46 or Telefile Worksheet, line 15.

Collect all Forms W-2 and 1099 for both yourself and your spouse (if filing jointly).

Prepare for your call by completing your U.S. return and the Telefile worksheet on the following pages.

If married filing a joint return, you and your spouse must be present to authenticate the filing of your return.

Complete the worksheet and call (617) 660-2000 or (413) 827-7100 to Telefile.

## Privacy Act Notice

Under the authority of 42 U.S.C. sec. 405(c)(2)(C)(i), and M.G.L. c. 62C, sec. 5, the Department of Revenue has the right to require an individual to furnish his or her Social Security number on a state tax return. This information is mandatory. The Department of Revenue uses Social Security numbers for taxpayer identification to assist in processing and keeping track of returns and in determining and collecting the proper amount of tax due. Under M.G.L. c. 62C, sec. 40, the taxpayer's identifying number is required to process a refund of overpaid taxes. Although tax return information is generally confidential pursuant to M.G.L. c. 62C, sec. 21, the Department of Revenue may disclose return information to other taxing authorities and those entities specified in M.G.L. c. 62C, secs. 21, 22 or 23 and as otherwise authorized by law.

### Form W-2 information

*Information you will need to Telefile can be found on your Form W-2.*

**Note:** If you were a state, local or county employee and made contributions to a Massachusetts state or local pension plan, your total amount paid to Massachusetts retirement (Telefile worksheet, lines 6 and 7) plus Medicare can be found in boxes 14 and 6 on Form W-2.

a. Control number		OMB No. 1545-0008									
b. Employer identification number		4		1. Wages tips other compensation		2. Federal income tax withheld					
c. Employer's name, address and Zip code		3. Social Security wages		4. Social Security tax withheld		6					
		5. Medicare wages and tips		6. Medicare tax withheld		6					
		7. Social Security tips		8. Allocated tips		5					
d. Employee's Social Security number		9. Advance EIC payment		10. Dependent care benefits							
e. Employee's name, address and Zip code		11. Nonqualified plans		12. Benefits included in Box 1							
		13.		14. Other							
		15. Statutory employee <input type="checkbox"/>		Deceased <input type="checkbox"/>		Pension plan <input type="checkbox"/>		Legal rep. <input type="checkbox"/>		Deferred comp. <input type="checkbox"/>	
16. State	Employer's state I.D. No.	17. State wages tips etc.		18. State income tax		19. Locality name		20. Local wages tips etc.		21. Local income tax	
		5		8							
Wage and Tax W-2 Statement 2000											
Department of the Treasury-Internal Revenue Service											
This information is being furnished to the Internal Revenue Service											
Copy 2 To Be Filed With Employees State, City or Local Income Tax Return											

# Telefile Worksheet 2000

1

Do you want to contribute to the Massachusetts Clean Elections Fund? If yes, ☐ \$1 You ☐ \$1 Spouse (if filing jointly). This contribution will not change your tax or reduce your refund.

**1** Filing status: ☐ Single ☐ Married filing jointly ☐ Head of household

**2** ☐ Number of dependents (do not include yourself or spouse). Are you a noncustodial parent? ☐ Yes ☐ No

Social Security number(s) of dependent(s) (up to nine dependents allowed)                                                               

Were any dependent members of household under age 12 as of 12/31/00? ☐ Yes ☐ No

## W-2 Information (wages only)

**3** Total number of Forms W-2 ☐ for you ☐ for your spouse. **Note:** Total number of Forms W-2 cannot exceed five.

**4** Enter the **Employer Identification number** for each Form W-2 (generally box b)

**5** Enter the total of **State wages/tips** (generally box 17) and **Allocated Tips** (generally box 8) for each Form W-2

**6** Enter **your** total amount paid to **Soc. Sec., U.S., RR. or Mass. retirement** plus **Medicare** for each Form W-2 (generally boxes 4 & 6)

**7** Enter **spouse's** total amount paid to **Soc. Sec., U.S., RR. or Mass. retirement** plus **Medicare** for each Form W-2 (generally boxes 4 & 6)

**8** Enter the total of **Massachusetts income tax withheld** (generally box 18) for each Form W-2

1st W-2				
2nd W-2				
3rd W-2				
4th W-2				
5th W-2				
	\$	\$	\$	\$

**5. TOTAL of above**

**6. TOTAL of above**

**7. TOTAL of above**

**8. TOTAL of above**

Round all dollar amounts to the nearest dollar (do not include cents). Add the amounts down the columns and enter the totals in the appropriate boxes above. You will need these total amounts when you make your call.

**9** **Unemployment compensation** (from U.S. Telefile, item D; 1040EZ, line 3; 1040A, line 13; or 1040, line 19). . . . . 9 \$

a. Total Massachusetts withholding for unemployment compensation (from Form 1099-G) . . . . . 9a \$

**10** **Total Massachusetts bank interest** (from all Massachusetts Forms 1099-INT). If none, enter "0" . . . . . 10 \$

**11** **Total amount of rent** you paid for your principal residence in 2000. If none, enter "0" . . . . . 11 \$

Landlord's name and address: \_\_\_\_\_

**12** **Earned Income Credit (EIC)**. Number of qualifying children. ☐ Enter EIC amount from U.S. return . . . . . 12 \$

Social Security number(s) of qualifying children                                                               

**D** If you are expecting a refund, **direct deposit** is available. See page 11 for more information. Check type of account: ☐ Checking ☐ Savings  
Routing number (first two digits must be 01-12 or 21-32) \_\_\_\_\_ Account number \_\_\_\_\_

**STOP!** **If you have other income, estimated tax payments, or wish to claim the student loan interest deduction or make voluntary contributions, see reverse. If not, you are ready to Telefile.**

**Call (617) 660-2000 or (413) 827-7100.**

Telefile will tell you the following amounts. Enter these amounts in the boxes provided.

**13** **Total tax for 2000** . . . . . 13 \$

**14** **Amount of your refund** . . . . . 14 \$

**15** **Amount of tax due** . . . . . 15 \$

Pay by credit or check card. See page 11 for more information. Enter authorization number \_\_\_\_\_

**16** **"Sign" your return**

You (and your spouse, if filing jointly) must be present to authenticate the filing of your return. Telefile will assign you a 9-digit confirmation number. Do not hang up until you receive this number; it is your proof of filing.

Confirmation number                      Date you Telefiled \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Complete page 2 of the Telefile worksheet only if you have taxable pensions and annuities, winnings, fees and non-Massachusetts bank interest and dividend income, you made estimated tax payments or you wish to claim the student loan interest deduction or make voluntary contributions.

## Telefile Worksheet 2000

2

### Winnings, Fees and Other Miscellaneous Income

**17 Taxable pensions and annuities** (from U.S. 1040A, line 12b; or 1040, line 16b). Enter total in line 17c. If any of these distributions include previously-taxed contributions, make the necessary adjustment by completing lines 17a, 17b and 17c:

a. Total pensions and annuities (from U.S. 1040A, line 12a; or 1040, line 16a) . . . 17a \$ \_\_\_\_\_

b. Contributions previously taxed by Massachusetts included in line 17a . . . . . 17b \$ \_\_\_\_\_

c. Taxable pensions and annuities. Subtract item b from item a and enter result . . . . . 17c \$

d. Total Massachusetts withholding for pensions and annuities (from box 10 of all Forms 1099-R) . . . . . 17d \$

Do not include in line 17c any contributory pensions from the U.S. government, the Commonwealth of Massachusetts or its political subdivisions, or any noncontributory pensions or survivorship benefits from the U.S. uniformed services (Army, Navy, Marine Corps, Air Force, Coast Guard, commissioned corps of the Public Health Services and National Oceanic and Atmospheric Administration).

**18 Winnings and Fees.** Enter total of all winnings and fees . . . . . 18 \$

a. Total Massachusetts withholding for winnings and fees (from box 14 of Form W-2G or box 11 of Form 1099-MISC) . . . . . 18a \$

**19 Non-Massachusetts bank interest and dividend income.** If the only interest you received was from Massachusetts banks and you have no dividend income, do not complete this section. If you need to make adjustments or exclude amounts other than Massachusetts bank interest, you cannot Telefile.

a. Total interest income (from U.S. Telefile, item C; U.S. 1040EZ, line 2; or 1040A or 1040, lines 8a and 8b) . . . . . 19a \$

b. Total dividend income (from U.S. Schedule 1, Part II, line 6; or U.S. Schedule B, Part II, line 6; or if U.S. Schedule B not filed, from 1040A or 1040, line 9) . . . . . 19b \$

### Other Information

**20 Student Loan Interest Deduction.** Enter the amount from U.S. Form 1040A, line 17 or U.S. Form 1040, line 24 (not to exceed \$2,000 for tax year 2000) . . . . . 20 \$

**21 Estimated Tax Payments.** If you made estimated tax payments in 2000, enter amount here . . . . . 21 \$   
If you are claiming a 1999 overpayment applied to your 2000 estimated taxes, you cannot Telefile.

**22** Do you want to contribute to the Organ Transplant Fund? If yes, enter amount . . . . . 22 \$

**23** Do you want to contribute for Endangered Wildlife Conservation? If yes, enter amount . . . . . 23 \$

**24** Do you want to contribute to the Massachusetts AIDS Fund? If yes, enter amount . . . . . 24 \$

**25** Do you want to contribute to the Massachusetts United States Olympic Fund? If yes, enter amount . . . . . 25 \$

**After completing worksheet, call (617) 660-2000 or (413) 827-7100**

# Frequently Asked Questions About Telefile

## What is the best time to Telefile?

Telefile is available 24 hours a day, seven days a week. The last week of January through the first week of February and from April 15 through April 17, between 5 p.m.–9 p.m. are the peak Telefiling periods; you may find the phone lines busy during these times.

## If I have never filed an income tax return with DOR, can I still Telefile?

You may be eligible to Telefile even if you have never filed a tax return with DOR. Just call (617) 660-2000 or (413) 827-7100 and enter your Social Security number. The Telefile system will then determine if you are eligible. If you are, you should hang up, complete the Telefile worksheet and call again. For more information on expanded E-File eligibility, see page 8.

## What should I do if my address or filing status has changed from last year?

You may Telefile if your address has changed from last year. You will be asked for updated address information before continuing. If your filing status has changed as a result of marriage, separation or divorce, you are not eligible to Telefile.

## Can I claim the Earned Income Credit through Telefile?

Yes. You must have your federal Earned Income Credit amount from your U.S. return or as computed by the IRS if you wish to claim the Earned Income Credit on Telefile.

## Can I claim the Student Loan Interest Deduction through Telefile?

Yes. You must have your federal Student Loan Interest Deduction amount from your U.S. return if you wish to claim the Student Loan Interest Deduction on Telefile. This amount cannot exceed \$2,000 for tax year 2000.

## Will I receive an official copy of my return?

Telefile will send you a receipt listing the total amounts of each item that you entered on your Telefile call. Your receipt should be kept as an official copy of your Telefiling. **Note:** If you choose to have your refund deposited directly into your bank account, you will not receive a receipt. Your worksheet should be kept as an official copy of your Telefiling.

## What if I do not understand a question asked by Telefile or I need to change an answer?

You can access online information by pressing the star (\*) button located below the number 7 on your telephone keypad. If you realize that you have confirmed an incorrect entry and wish to change your answer, simply hang up before authenticating your return and dial Telefile again.

## What should I do if I need to amend my return?

If, after you Telefile, you receive an additional Form W-2 or discover that you have made an error, you may dial (617) 660-2033 to access Amended Telefile or you may file a Massachusetts Form CA-6, Application for Abatement/Amended Return. Amended Telefile is scheduled to be available beginning February 12, 2001. You must wait at least four days from the date of your original Telefile call before using Amended Telefile. Do not attempt to dial the standard Telefile phone number a second time or file a paper return. Forms to amend your 2000 Telefile return are available by calling (617) 887-MDOR or toll-free in Massachusetts 1-800-392-6089.



# Students, Recent Graduates and New Employees, Read About Expanded E-File Eligibility

Even if you have never filed a tax return with the Department of Revenue (DOR) before, you may be able to file using one of DOR's E-File methods. In addition, if you have filed with us but have never used Telefile, Web File or Electronic Filing, we encourage you to do so this year. We have streamlined all of our E-File methods to make them easier to use than ever before. E-File eligibility has also been expanded by including the student loan interest deduction and by eliminating the previous \$1,000 threshold for interest and dividend income.

The Department wants to encourage as many taxpayers as possible to use any one of the available E-File methods when filing their income tax returns this year. See page 2 for more information regarding the various E-File methods.

It's easy to find out if you're eligible. Just call (617) 660-2000 or (413) 827-7100 and enter your Social Security number when prompted, using your telephone's keypad. If your Social Security number is listed on DOR's Telefile database and you meet the necessary criteria, you may be eligible to E-File. Even if you cannot use IRS Telefile, you are most likely eligible to use Massachusetts Telefile. Interested Web filers can also use this phone method to check their eligibility.

If the system determines that you may be eligible, simply hang up, fill out the Telefile worksheet and call (617) 660-2000 or (413) 827-7100 when you are ready to file your return. If you have never filed with the Department of Revenue before, it will be necessary for you to provide your name (and your spouse's name if married filing jointly) and address. Please spell your name clearly and slowly into the phone. This is important to ensure proper filing.

The Telefile system will prompt you for your entries and repeat them back to you for your confirmation. Telefile performs all of the calculations for you and will tell you what your tax and refund or balance due amounts are. If you are due a refund, a check will automatically be sent to you in three to four days. If this is your first time filing with the Department of Revenue, you will not be able to take advantage of Direct Deposit this year. If you have a balance due, you can pay in full by MasterCard, Visa, Discover or Novus brand card or you can mail in your payment by April 17, 2001 using the Telefile Payment Voucher, found on the inside back cover.

Please take advantage of one of these convenient E-File methods when filing your tax return this year.



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## What Other Resources Are Available

The instructions in the Department of Revenue's tax forms should provide answers to most taxpayer questions. If you have questions about completing your Massachusetts tax form, you can call or visit any of the Department of Revenue offices listed on the next page Monday through Friday, between 8:45 a.m. and 5:00 p.m. Taxpayers can also call TaxTalk, the Department's 24-hour automated system of recorded tax help, at (617) 887-MDOR or toll-free in Massachusetts at 1-800-392-6089. In addition, DOR issues a number of useful publications on various state tax issues. These publications include: tax-specific guides written in question and answer format such as the Guide to Filing Your 2000 Massachusetts Income Taxes; a quarterly newsletter, the Taxpayer Advisory Bulletin, with updates on legislative, legal and Departmental decisions; and public written statements, such as Regulations, Technical Information Releases (TIRs), Directives and Letter Rulings. These may be obtained by calling (617) 887-MDOR or toll-free in Massachusetts 1-800-392-6089 or by visiting DOR's website at [www.massdor.com](http://www.massdor.com).

## World Wide Web



DOR's website offers visitors a searchable index of legal rulings, tax forms, and publications; news releases; statistical data and related articles. In addition, our website provides timely information from our Local Services and Child Support Enforcement divisions.

Visit DOR's website today at [www.massdor.com](http://www.massdor.com).

DOR recently launched the Bay State Business Connection — [www.baystatebiz.com](http://www.baystatebiz.com) — a one-stop website for researching and complying with tax laws and other business obligations, and for tapping into a wealth of Massachusetts business resources. The website is geared toward small and medium-sized businesses, new businesses or businesses considering locating in Massachusetts. The site allows you to download free software for filing sales and withholding tax returns via your PC; update your TA-1 (trustee tax) registration online; and locate information, forms and guides on: taxes, unemployment insurance, workers' compensation, child support, business regulations, economic development resources, and much more.

## TaxTalk

TaxTalk is DOR's automated system of recorded tax information available by calling (617) 887-MDOR or toll-free in Massachusetts 1-800-392-6089 during non-business hours. TaxTalk topics are also available through DOR's Fax on Demand system or via DOR's website at [www.massdor.com](http://www.massdor.com). For a menu of TaxTalk topics available on Fax on Demand, please call (617) 887-1900 using the handset and keypad on your fax machine and, when prompted, enter document retrieval number 4000. To access the TaxTalk topics through DOR's website, click on "Help/Resources." TaxTalk includes information on what's new for tax year 2000 as well as answers to commonly asked questions concerning personal income tax, sales and use tax, meals tax, withholding tax, room occupancy excise, sales tax on motor vehicles, corporate excise, partnerships, estate tax, and your rights as a taxpayer.

### DOR locations in Massachusetts

19 Staniford Street  
**Boston** 02204  
(617) 887-MDOR

218 South Main Street  
**Fall River** 02721  
(508) 678-2844

1019 Iyanough Road  
**Hyannis** 02601  
(508) 771-2414

333 East Street  
**Pittsfield** 01201  
(413) 499-2206

436 Dwight Street  
**Springfield** 01103  
(413) 784-1000

40 Southbridge Street  
**Worcester** 01608  
(508) 792-7300

### DOR locations throughout the country

1355 Peachtree Street NE  
Suite 1280  
**Atlanta, GA** 30309  
(404) 874-2922

101 South First Street, 4th floor  
**Burbank, CA** 91502  
(818) 840-9059

150 North Michigan Avenue  
Suite 2035  
**Chicago, IL** 60601  
(312) 899-9040

2603 Augusta Drive  
Suite 1075  
**Houston, TX** 77057  
(713) 784-7225

1440 Broadway, 22nd floor  
**New York, NY** 10018  
(212) 768-2750

355 Fifth Avenue  
Suite 1400  
**Pittsburgh, PA** 15222  
(412) 281-2776

## Where to Get Forms and Publications

During the income tax filing season, you can pick up Massachusetts personal income tax forms in many convenient locations, including post offices, libraries, and major city or town halls; any DOR office listed on this page; or IRS district offices across the state.

To obtain Massachusetts forms and publications by phone, call the Department's main information lines at (617) 887-MDOR or toll-free in Massachusetts at 1-800-392-6089. Please note that many forms and publications are available 24 hours a day by calling the Department's automated forms request system at the numbers listed above.

Many Massachusetts tax forms and publications are available via DOR's website at [www.massdor.com](http://www.massdor.com). In addition, certain forms and publications can be obtained through DOR's Fax on Demand system. For a complete Fax on Demand menu, please call (617) 887-1900 using the handset and the keypad on your fax machine.

### For general tax information

Please call (617) 887-MDOR or toll-free in Massachusetts 1-800-392-6089 for assistance with the following:

- |                         |                           |                         |
|-------------------------|---------------------------|-------------------------|
| ▀ abatements            | ▀ corporate trusts        | ▀ partnerships          |
| ▀ bills and payments    | ▀ estate taxes            | ▀ personal income taxes |
| ▀ business registration | ▀ estimated taxes         | ▀ refunds               |
| ▀ business taxes        | ▀ fiduciary taxes         | ▀ withholding           |
| ▀ corporate excise      | ▀ nonresident information |                         |

### Extended telephone service hours

If you have personal income tax questions or need assistance completing your Telefile worksheet, extended telephone service is available at (617) 887-MDOR or toll-free in Massachusetts at 1-800-392-6089. From January 15 through April 17, 2001, these extended hours will be: Monday through Thursday, 5–7 p.m.; Saturday, 9 a.m.–1 p.m.; and Sunday, 10 a.m.–2 p.m.

### For help in one of the following specific areas, please call the number listed below:

- |   |  |
|---|--|
| ▀ Certificates of Good Standing (617) 887-6550  | ▀ Installment sales (617) 887-6950       |
| ▀ Teletype (TTY) (617) 887-6140   | ▀ Small Business Workshop (617) 887-6400 |
| ▀ Vision-impaired taxpayers can contact any DOR office listed on this page to receive assistance.   |  |
| ▀ Upon request, this publication is available in an alternative format. Please send your request to: Office of Affirmative Action, PO Box 9488, Boston, MA 02205-9488 or call (617) 626-3410. |  |

To report allegations of suspected misconduct or impropriety involving Department of Revenue employees, please call the Inspectional Services Division's Integrity Hot Line at 1-800-568-0085 or write to PO Box 9480, Boston, MA 02205-9480.

## Direct Deposit

**D** You may elect to have your refund deposited directly into your savings or checking account. Check with your financial institution to make sure that it accepts direct deposit and to verify their Routing Transit Number (RTN). If we are unable to honor your request for a direct deposit, a paper check will automatically be sent to you.

The routing number of your financial institution is nine digits and begins with 01–12 or 21–32. The account number can be up to 17 characters. Omit hyphens, spaces and special symbols. Enter the number from left to right. See sample check to right for location of this information.

A sample check from JANE TAXPAYER to JOHN TAXPAYER. The check includes fields for Date, Amount (1234), and a routing number (020250025) and account number (202020186). The routing number is circled and labeled 'Routing number' and the account number is circled and labeled 'Account number'. The check is marked 'SAMPLE'.

**Note:** Only one direct deposit is allowed per account number.

## Credit or Check Card Payment

If Telefile determines that you owe tax, you have the option of paying this amount in full with your MasterCard, Visa, Discover or Novus brand card. To do so, you will be required to enter your account number and the four-digit expiration date (month and year) after authenticating your return. You should have your credit or check card information readily available. This option is not available for Web filers.

**Note:** You can pay with your Mastercard, Visa, Discovery or Novus brand card only during your original Telefile call. The appropriate amount will be credited to your Department of Revenue account on the next business day.

## If You Need to Send a Payment



Complete the Telefile Payment Voucher below by including the following information:

1. Your name, and spouse's name if filing a joint return, and address;
2. Your Social Security number, and spouse's Social Security number if filing a joint return; and
3. The amount of the enclosed payment.

Mail to: Massachusetts Department of Revenue, PO Box 7062, Boston, MA 02204-7062.

If you do not make full payment of the tax due on or before April 17, 2001, you will be sent a Notice of Assessment (NOA). This notice will show your tax due, plus any interest and penalty assessments for late payment.

DETACH HERE

### Telefile Payment Voucher 2000

### Massachusetts Department of Revenue

First name M.I. Last name

Social Security number

Spouse's first name M.I. Last name

Spouse's Social Security number

Street address

Amount enclosed

City/Town

State

Zip

Mail to: Massachusetts Department of Revenue, PO Box 7062, Boston, MA 02204-7062.

Make checks payable to Commonwealth of Massachusetts. Write your Social Security number on your check or money order.



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**Massachusetts**

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**Department of**

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**Revenue**

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PO Box 7011

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Boston, MA 02204

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U.S. POSTAGE  
**PAID**  
COMMONWEALTH OF  
MASSACHUSETTS

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## Dear Taxpayer,

There's no dispute that electronic filing — "E-filing" — is the fastest and most accurate way to file your state personal income tax return. As part of our continuing effort to utilize technology to improve service to taxpayers, the Massachusetts Department of Revenue (DOR) this year is offering four ways to E-file your tax return:

- by touch-tone telephone using Telefile;
- via the web, by preparing and filing your return, at no cost, online at DOR's website, [www.massdor.com](http://www.massdor.com);
- by using the services provided by a DOR-approved tax professional; and
- by using a DOR-approved commercial tax preparation website or software product.

Each E-file method is designed to be easy to use and convenient, and allows you to deposit your refund check directly into your bank account. In addition, Telefile allows you to use your credit card to pay any tax due. Whether you prepare your own state tax return or have a tax professional complete your return, with E-file you can rely on 24 hours a day, seven days a week availability, instant confirmation that your tax return was received by DOR, and one of the country's fastest refund turnaround times — four days.

In recognition of the importance of protecting the confidentiality of personal information, this year your social security number has been removed from the preprinted tax forms you receive through the mail. Instead, you will find a PIN — a personal identification number — to be used when you Telefile or file via the web at [www.massdor.com](http://www.massdor.com). If you file using a paper form, please remember to include your social security number on the form. In addition, the tax form now includes a check-box where you can authorize DOR to discuss with your tax practitioner matters that may arise during the processing of your tax return.

For more information about DOR's E-file programs, or to check the status of your refund or quarterly estimated payments, please visit our website, [www.massdor.com](http://www.massdor.com), a useful resource for all of your state tax needs. I encourage you to use the website's e-mail function if you have any questions, comments or suggestions. You also can call our Customer Service Bureau at (617) 887-MDOR or toll-free in Massachusetts at (800) 392-6089.

Sincerely,

A handwritten signature in black ink, reading "Frederick A. Laskey". The signature is written in a cursive style with a large initial "F" and "L".

Frederick A. Laskey  
Commissioner of Revenue